

Champions for Social Good Podcast

Empowering Leaders to Make A Difference: A Conversation with Mark Monchek of Opportunity Lab

Jamie: Hello, and welcome to the Champions for Social Good Podcast. I'm Jamie Serino, Director of Marketing for the MicroEdge division of Blackbaud. I'm here today with Mark Monchek the Chief Opportunity Officer of Opportunity Lab. Welcome, Mark.

Mark: Thanks, Jamie. Very excited to be here. I'm excited to share with you some of the insights we've been working on these days.

Jamie: Yeah, we're really excited to have you. Opportunity Lab is a really cool organization and we're excited to learn more about it. Why don't you start off by telling us a little bit about yourself and a little bit about The Opportunity Lab?

Mark: Sure. Well, I've been working with companies, both for-profit, nonprofit, social innovation organizations, startups, large corporations, global corporations for about 35 years. And I've seen the arc of the growth in how you look at business and how business has changed radically during the years. I've also done filmmaking and poetry and done large scale events that bring people together in community.

Mark: It's all around our mission at The Opportunity Lab which is to empower conscious leaders to build great companies and make a difference in the world. So what does that mean? It means actually, working with organizations, both for-profit and nonprofit, that care deeply about their customers, their employees and their communities, and they wanna grow profitably and sustainably. They wanna reach scale in a good way, in a way that makes the world better.

Jamie: Right. And yeah, we're reading a lot more about that, that you don't have to make the sacrifice between one or the other. So can you tell us a little bit about when you first begin working with a company and you begin to explore this notion that you don't need to sacrifice one over the other?

Mark: Sure. I'll give you the first really important project that we did back in the early '90s and how that shifted our thinking about what's possible in companies. This company was called Display Technologies, and we started with them... They were two separate divisions, it was the division that did stock products and there was the division that did customs. What they did is they designed and they produced point-of-purchase displays, the kind of thing if you would go into a supermarket and you would see, back in those days, there were CDs and videotapes, or soda, or juice, or any type of product that was held in a store. They were considered vendors. They produced these products and they basically sold on price. And they were competing with hundreds of other vendors in the New York area and thousands around the country. And basically, they had an amazing capacity to design, they had passionate employees. But they were stuck in this model of just competing on price.

Mark: When I went there and I started to see their, what we call Success DNA, their greatness and their resource ecosystem, which we'll get into later on the resource map, I tried to see, they're actually an in-store advertising firm. What they do is they help the customer of their customer decide what to purchase when they're in the store. So you might go into the store and you are gonna buy a Tropicana orange juice. Your wife sends you to buy Tropicana and you happen to go and see, "Wow, there's a Minute Maid, two for one." While you've made the decision to buy Tropicana, but you know what? When you're in the store, that's when you actually make your decision.

Mark: So 75% of consumers make their decision in the store itself. But the advertising is basically on television and print media, now it's obviously social media and digital. But back in those days there was none of that. So we realized that the real value of this company was helping their customers help their customers make a decision in the moment they were buying. So we shifted them from thinking themselves as just a vendor of these point-of-purchase displays, to actually the design and creator of these amazing ways that help consumers make their decision.

Mark: So, how does that mesh with profit and purpose? Well, we had 20 employees, these two companies, and we scaled to 120 employees within five years, going from \$8 million a year in revenue to about \$90 million in revenue in a very, very fast track. And the way that we did it is, we empowered employees at the ground level, at the middle management level, and of course, at the owner senior level to actually create this firm themselves. So rather than have a business plan that we impose on them, we sat in strategic planning meetings, "What is your unique greatness? What are you most passionate about? What are you really great at? Where's the market opportunity?" And from that, came a strategic plan that was organic, and that really played to the strengths of the employee base that they had.

Mark: And so, we added better benefits for the employees, we added more opportunity for people to go move up in the firm and have different types of jobs and careers, make more money, have better compensation because it was really a company that was built from the ground up. So the opportunity for employees to have a better life is really a core part of our mission of empowering conscious leaders to build great companies. So their profitability went way up and their ability to serve their customers went further way up. And their ability to have employees that were empowered and happy, and had a career went also, that way up, beyond what they even thought they could do.

Jamie: Right, right. Yeah, that's a great success story. Well so, since you mentioned it, do you wanna tell us a little bit about Success DNA?

Mark: Sure. Success DNA has a fascinating story. All of the products and the tools that we have I think have amazing origin stories. And every company and every person has an amazing origin story. So we work a lot with origin stories. The origin story of Success DNA goes back to 9/11. So 9/11, I actually watched the towers go down from our offices back then, we're on Broadway and 21st Street. And it was the most horrific thing I had seen in my entire life. I could not believe this was actually happening. And like many New Yorkers, I sat in my apartment for three days, incredibly depressed. I called the Fire Department, I called the Police Department, the Red Cross, trying to volunteer. We were not prepared for that level of disaster. And there was no way to actually volunteer, they weren't... Unless you actually went down there and happen to be lucky enough to get on a crew, probably you wouldn't even had a chance to volunteer.

Mark: So that Friday, after 9/11, I got a call from an Employee Assistance Program in Chicago that was looking for somebody that was trained in Critical Incident Stress Debriefing, which is a process developed by Jeffrey Mitchell, a firefighter in Baltimore, to help first responders. I was one of the few people in New York who was trained in it. I never actually used it in any type of scale but they said, "Well, we want you. Do you want to go to White Plains, where our firm was relocated from the towers over there or do you wanna go a half mile from Ground Zero where one of the firms that had lost 62 people is relocating?" I said, "I wanna go down to Ground Zero."

Mark: So, on September 18th, one week after 9/11, I watched the greatest miracle in the history of my career unfold in front of me. So I was waiting there. We were there to set up a Crisis Management Center for Euro Brokers. This was a company that lost 62 people in Tower 2. And before we could set up our Crisis Management Center, we actually had to watch them set their business up again. So imagine, losing 62 people, losing all of your records, losing your physical offices, having the horror of having that memory of something that happened just a week ago, and also losing a lot of the software code. They had to start from scratch.

Mark: So how do they do this? The owners and the senior executives were really busy with the media, they we're busy with their major clients. This is a global trading firm that traded stocks, and currencies, and bonds,

and different financial instruments around the world. So they were dealing with Goldman Sachs and all the major money center banks, the insurance companies trying to make sure that their people were taken care of. And the middle management or frontline employees were the ones who decided where the desks were gonna go, where the TV monitors were gonna go, how people were gonna sit, where the coffee and the doughnuts were brought in.

Mark: So I realized it was a DNA in this organization that existed without a blueprint, without the senior management people telling them what to do. They just knew instinctively how to do it because this was an organization that was like a tribe. They were people who often knew each other. They went to Saint Peter's and Fordham, and Manhattan College. They did not go to Ivy Leagues. They often recruited their friends and neighbors to work with them. Their parents were police officers and nurses, and firefighters, not business owners and chief executives. And they had this tribal connectivity with one another and that came in handy when they actually had to be resilient under the face of this amazing crisis.

Mark: So I understood that Success DNA of Euro Brokers was in a crisis, they were resilient and they understood that they could band together and work together collaboratively to figure out the solution to something that didn't seem to have a solution. So when we understood this, we set up this Crisis Management Center to be as resilient as the company itself.

Mark: So rather than having specific office hours and having an office in the back, and trying to do it a very structured way, we taught our team to basically walk around in a very, very unobtrusive way, and little by little in a very gentle way, to make relationships with the desk managers, people who ran the trading desks. And they were the ones that really knew who was suffering and who needed the most help and how to make an introduction to them.

Mark: And so, we would hang out at the coffee center, where people were taking bagels and doughnuts, and started to become part of this newly reformed organization. And we asked them, "So what do you need from us? How do we set up this crisis management unit to be responsive to the way you guys do things?" So we collaborated with them, we co-created with them, rather than to tell them what to do or to inject from outside in. And you have to understand the Success DNA of an organization has to be honorative in order for you to actually work in a successful project. If it were in the military, it would work. They have a very top-down authoritarian structure and something informal and spontaneous, and organic from within isn't gonna work in that organization.

Mark: So it was the first time I really understood that organizations have their own Success DNA, and it doesn't depend on who was the CEO at the time or who's the Chairman at the time. It goes much, much deeper than that. So when you see organizations where the leadership changes, some of them fall apart because there is no real Success DNA that binds the organization organically. And others, they can respond like Euro Brokers did to any tragedy because they have that ability to be able to respond.

Jamie: Right. So what happened next with that firm? So as you got them set up and were discovering their Success DNA, then what was the next step?

Mark: We got them set up. We did individual counseling, both just informally on the floor or we would set people to come back up to our office in the back which were private. We then did these Critical Success Incident Debriefing sessions with each department. And we had the owners and executive leadership team go first 'cause we wanted to demonstrate to the rest of the people that they were gonna do this, and they wanted to actually share their experiences.

Mark: So the way that Critical Incident Stress Debriefing works in really short order, is you basically ground yourself in, what happened? Where were you? What was your first thought? How did you feel? What do you need to do to regroup? What are the actions you're gonna take next? How can we support you? So it's a whole circle. And when everybody does that, it was really astonishing to see how it brought people together 'cause it gave people the context. 'Cause some people were not in the building. Some people escaped the building,

some people didn't escape until the last minute, almost got killed and everybody had a different perspective on that.

Mark: So when you're really building a team back that's been decimated by that kind of a crisis, you have to ground them back in the reality of the individual and then the reality of the group. Once we did that for every department, then we checked back with the desk managers to see how the people were doing. And the owners of the company basically said, "You guys can come back", people who were not coming back to work, "whenever you want, we're gonna pay you 100% and we're gonna raise money for your families." And that sense of purpose, what we call the Power of Purpose, made people so motivated to come back to be with their tribe that we had 96% of the employees come back to work full-time, within the first three months.

Jamie: That's great.

Mark: Company was profitable by the fourth quarter and they donated \$3 million to the Euro Brokers Memorial Fund to help the surviving families of the people who had been lost in 9/11. So the company went from the brink of extinction to being a stronger and better company, profit and purpose. And they eventually were sold five years later to Cantor Fitzgerald which was the firm that lost the most number of people in 9/11.

Mark: And I kept in touch with several people from there. I actually went up to Toronto to visit one guy that was almost killed. He escaped from the 84th floor where the plane hit Tower 2, and it was hit by a fireball, almost killed, and he survived. And now, he is basically coaching people about resilience and using his story to be able to help inspire people that feel like they can't manage a crisis like that.

Jamie: Right. Right. Wow, that's a great story. So, there's something else that you guys do called Resource Mapping Lab. I wonder if you could talk a little bit about that?

Mark: Sure. Like I mentioned earlier, the origin stories of companies and people are so interesting and you learn a lot about them by understanding where they started. So the resource map, the idea for it started with my ancestors and hearing the stories of my grandparents, great grandparents, who came from Eastern Europe, from Russia, and Poland, Czechoslovakia. Two million of Eastern European Jews came between 1880 and 1920, one of the largest migrations in history.

Mark: And they came with a steamer trunk and a dream, the American dream. They didn't know the language, most of them did not have skills that were particularly adaptive to the American economy, but what they did have is the motivation and they had families and social networks within those families that helped them support. So back then, there was an idea of the greater good. So if you and I were cousins and I was over here and you were over in Minsk, we would get around and sit around in a family circle and say, "Okay, you know, Jamie's next. When are we gonna have him come over?" You get a telegraph, "You're coming over, we have an apartment for you. You'll live in our apartment, we're gonna get you a job and eventually we're gonna find you a girlfriend and probably get married."

Mark: So there was this whole network and I realized this was a resource ecosystem that if you could map it, you could really empower it in an enormous way. I didn't really understand the idea of mapping back then, but I realized it was this ecosystem, it was incredibly powerful. But it was really a theory, it was an idea.

Mark: Then in 1981, my wife and I bought our first home in Midwood, Brooklyn, and six days after we had moved into the house, somebody tried to burn it down. Arson fire, somebody threw gasoline underneath the kitchen door, lit up and almost burned down the entire house. So we moved back into the house with no heat, no hot water, no windows, no kitchen. Basically living in an urban warzone...

Jamie: Yeah, like a shell.

Mark: And we had very little money, you know, newlyweds, the insurance companies basically drag out the payments to you for months and months and months. So what we realized is we had friends and family and

neighbors who we had just met who were there to help us and I thought, "This is the ecosystem recreated in this neighborhood." So through these friends and these families, these neighbors, these people who were strangers who walk by our house and saw it, and said, "How can I help you?" that we were able to survive. So we found the plumbers and the tile layers, and the carpenters, and the people to help us scrape the floors, and the person who put in the alarm and all of that, through this ecosystem.

Mark: And I realized, if we could map it, visually depict it, then we could really leverage it. But back then, this was in the early '80s, we really didn't know much about mind mapping. We were just in the beginning of the computer era, so if you had a laptop you were really big. But as the technology developed and I understood what mind mapping was, we began to develop mind maps of your resource ecosystem.

Mark: So I realized, what are the key parts of an ecosystem? So there's people, obviously is at the center of anybody's ecosystem. But not all people are alike. There are people of different categories. So we broke the people category down into connectors, experts and accelerators. For those people who've read *The Tipping Point* by Malcolm Gladwell, it's a similar way to categorize. He uses connectors, mavens, and salesmen as his three. We configured it a little bit different. Connectors are pretty much the same as he uses. So connectors are people with large social networks, who love to spread ideas, and they're the people, when you want somebody hear about something you're doing, you tell them and they tell everybody. So they have big numbers of people on Facebook and LinkedIn and they're always emailing and texting and Twittering and Tweeting and all that.

Mark: Then there's experts who are really, really deeply knowledgeable in their field. They're highly respected and they're the person you go to when you want advice on something, when you want some knowledge about a particular field. They may not have a large following but they have a deep following and the following is somebody that will really do something when that expert tells him to do something.

Mark: Then you have accelerators which are a unique combination of connectors and experts. Those are the people who can put the right people in the room around the right question, and they can help you get to the next level faster than anybody else. There are very few accelerators, but if you find one and you connect to that person and you ask them, not how they can help you, but how you can help them, then they're usually very generous people. That's how they got to be that powerful. And then they will say, "Oh, how can I help you?" And the accelerator uses their large social networks, their expertise, to be able to connect you around: What is the question you need to answer to be able to get where you wanna go?

Mark: So if you have a really, really great community of connectors and experts and accelerators, that is hugely beneficial to you. But those people operate in an ecosystem. They're organizations, so every one of those types of people are connected to organizations. So they're alumni of their high schools, of their colleges. They are community organizations. They are the organizations in which they work. There's the trade associations in which they operate within their field. There's an enormous number of different types of organizations. So imagine you connect to the person and then you connect to their organization, now you've gone from one person who has maybe a couple thousand connections to an organization that has a couple of million connections.

Mark: Then you have markets. So in the case of going back to where I was telling you about our home, we have to understand the ecosystem of the real estate market. So the real estate market where we bought the house was a market that helped us actually survive to get back. And so there was our real estate broker, there was our bank, there was our attorney, there was the real estate appraiser. 'Cause when we had to get the house fixed, we had to have somebody come back and appraise it and inspect it. Then there's the people who supply equipment, the lumber yard and the plumbing supply company, all part of this ecosystem of this real estate local residential market. So if you think about it, any market has an ecosystem within it. So you look at the markets you do business in.

Mark: So then you have sources of capital, where do you raise money? So in our case, it was basically family and friends and our local bank, and eventually, the insurance company did pay us a good deal of money but it

took a long time. So we needed an interim bridge loan and gifts from family to help us. So other sources of capital for our organization would be angel investors, venture capital firms, commercial banks, government organizations, like a small business administration or the nonprofit world. Obviously there's corporate foundations, there's private philanthropy, there's individual donors. When you map this, you start to see there's far more resources than you're aware of.

Mark: Then you have knowledge, which is proprietary knowledge or non-proprietary knowledge. So proprietary knowledge is something that you've copyrighted, something that you've patented. You guys here at Blackbaud and MicroEdge have a lot of knowledge, both proprietary which you own and others that you don't, not proprietary, but are really important to your brand. The more you understand your knowledge of you and your organization, the more powerful you become. You then become an expert in that people category.

Mark: And then the last one is communication, how do you get your messages out to the world? So that is social media, email, website, word of mouth, presentations you make, podcasts like this. So when you look at that as an ecosystem, people, organizations, markets, sources of capital, knowledge and communication all linked together, it's extremely powerful. So if you use LinkedIn as an example of one way that people connect to their networks, I have about 2,000 people direct connection to me on LinkedIn. So how many people would you imagine that I could reach? If I wanted to tell people about your podcast, say, "This is the best podcast ever" and I send down an email to all of my 2,000 people. And they sent out an email to all of their connections and then to all of their connections. So imagine a tree going out with these three circles intertwined. How many people roughly do you think that connect?

Jamie: We get into the hundreds of thousands.

Mark: Well, actually it's into the millions. So it's something like... LinkedIn has an algorithm, I don't know if they still show it on your page. But when I initially did it, when I had 1,800 people, it was like, I think 11 million. If you really grasp that, that your ecosystem, three degrees of separation from you, if you're a fairly significant connector, is huge. There are as many clients that you need, as many investors, as many employees, as much talent, technology, new processes within your ecosystem only three degrees of separation from you right now. So the map basically empowers your organization to see that ecosystem and leverage it.

Jamie: So you help create these maps for the organizations that you work with then?

Mark: Yes, we create the map with them and we help them use the map. So I'll give you an example of a nonprofit that we worked with, then I'll give you a little example of how we work with nonprofits and how this particular nonprofit used the map.

Jamie: Okay.

Mark: There is a literacy group called the Literacy Assistance Center which has been around for about 30 years. They do amazing work in helping organizations that work with people who have literacy challenges get their GED and their college education. The LAC does training, certification, technical assistance, data gathering for hundreds of direct service literacy organizations in the New York area, both New York City and state. And they also contact and work with a lot of organizations around the country.

Mark: So back in 2011, we were working with them and they said, "We have this idea for the LAC Academy. We wanna help people get certified as teachers of adults because in teachers of children, everybody has to be certified to be a teacher. But there are so many adults that are going back to school and getting a literacy training in English as a Second Language and all kinds of types of education, but there's no certification for that. And they wanted to build their overall brand of Literacy Assistance Center. "We wanna create the first ever summit. We want to bring people together from around the country: The researchers, the academics, the thought leaders, the people who run foundations who fund literacy groups. People who run the literacy groups themselves together to really tackle this issue of adult literacy, but we don't know how to do it."

Mark: So we built them a resource map and the first map that we built for them had 26 people, 17 organizations, a lot of knowledge, a lot of communication and only three sources of capital, which were the three funders that they had at the time, not one other source of capital. Looked at this map saying, "Well, you've got a lot of great resource ecosystem, but the one which is really, has this huge gap is your source of capital." So we said, "Alright, let's expand this resource map exercise to the entire board of directors and the entire staff." The first map we did was with a handful of three or four people. So we changed the question we asked, and the questions you ask are really important to shape the answers you get. So this time, rather than just say, "Who are your connectors, who are your experts?" we said, "If you had to raise \$3 million in three months or you're out of business, who would you go to and how would you do it?" And we gave them the same categories. The burning platform question. Guess what happened? 17 new sources of capital come on the map.

Mark: Now imagine, they're all in a room and they're looking at each other. Three of those sources of capital happened to have the last name of Soros, as in George Soros and his two children having foundations. So the person who had known George Soros and his children's foundations was sitting sheepishly in the corner of the room and people said, "Who knows the Soros? 17 organizations. How come we weren't contacting them?" It was amazing amount of hub-bub and noise in the room. So the person who had known the Soros family said, "Well, I know them." "How come you never mentioned it?" This was the moment, Jamie, a light bulb went off. "Nobody ever asked me. I'm Director of Programs Education. I've never sat in on a development meeting."

Mark: Now this is a group that had a very small number, or a relatively small number, 15 people, very dedicated, great passionate people. But they just had no mechanism, like most organizations do, to share this information. Once they had the map and they had the technology to use the map, and the methodology to get the most out of the map, they were able to do this summit. So we did the summit in the fall and we had thought leaders from organizations, from Harvard. We had the guy who made a film about adult literacy from a leading educational think-tank in Princeton. We had people from CUNY. We had people from local literacy organizations. Just an amazing... From AARP. We had a couple of people from AARP national organization in Washington.

Mark: And so, we used this summit to get people around this issue to be able to really improve the brand of Literacy Assistance Center. Eventually there was some money that was raised out of it, some projects that came out of it. And they thought of themselves on a different level because they were able to see their ecosystem in a much more powerful way and to work together as a team.

Jamie: Right, that's great, great example. So I think some people might say... I don't think a lot of people are asking the type of questions that you ask when you build these maps. But I think people might say, "But I am leveraging my network. I do have a large network and I put things to LinkedIn and Twitter", and if you get that kind of question, what would you say? I don't know, either these people are doing wrong or what more can they do, or maybe they say, "I am going and asking for money" or "I'm asking for support" or "I'm just asking for people to be interested", and they're not getting much of a response even though their network might be big, and they might be trying to leverage it. What would you say to a person that might come with you with that issue?

Mark: That's a great question, and we do get that fairly often. We always start with what works, not what doesn't work. So I would start with saying, "Okay, great. Tell me how you're doing it? Tell me what are you doing to connect to LinkedIn? How do you actually access and leverage your resources?" And I'll highlight what they're doing right. So obviously if they're still in business or they're a nonprofit that's still surviving, they're obviously doing something right. So I wanna see what they're doing right.

Mark: And so the Success DNA is actually taking what you're doing right and doing it as your standard operating procedure, as your operating system, as your way of thinking. So we say, "Alright, great. So tell me the three most successful projects you've done using your network?" And they'll tell it to me. "Great, okay, that's great. So let's look at the conditions inside the organization and outside in the marketplace, in the environment when these successes happened." So now we're grounding them into what works. "What's the

one thing you wish you could've done that just went terribly wrong, that you consider a failure?" And then when they say it, they go, "Oh, my goodness." When we fail, we don't do the things that we do when we succeed. We go off of our success pattern. And then we'll say, "If there was one thing you'd like to do that you're not currently doing, one project, one thing you'd like to fund, what would it be?"

Mark: And automatically, they know what it is. So, "Alright, so if we were to take what you do well, and then take it to the next level, maybe using this resource map, how do you think we could do it? How could you use that would tell you... Going back to the map... How do you think you'd use it well?" They'd go, "Oh yeah, we would do this, we would do that." "So would you like us to build a map around this specific goal?" "Yeah, alright." So we don't tell them what they're doing wrong, or we don't tell 'em like, "If you just do this, there needs to be better..." We actually try to really get them grounded in what they're already doing well. And then saying, "Alright, what's the thing that you need to do better?"

Mark: So that's really an organic way of partnering with a client. A lot of consulting firms and training firms, advisory firms, they go in and they look at what's wrong and say, "All right, here's what you gotta do to fix it." And then they leave, and they've really not added anything to the infrastructure or the capacity of the organization, and this...

Jamie: Right. This is a 'teach a man to fish' kinda thing.

Mark: Yeah. So we wanna actually become part of the ecosystem and become a resource that puts us on their map. We wanna be a resource on their resource map, so they can feel like we not only are valuable to them, let's say as an expert or connector, but we can help them actually build their resource map by bringing in resources from our ecosystem into theirs, and then teaching them how to use it.

Jamie: Right. And I like that you're asking these kinds of questions 'cause they seem simplistic, but no one stops to ask themselves, or a lot of people don't take that approach, and they do try to take the opposite approach. I think that's really cool.

Mark: Why do you think they don't? When you heard it, it seemed obvious to you, and a lot of our clients it seemed obvious to them, so why do you think something that seems obvious in retrospect is not something that...

Jamie: I think people get mired in the frustration of what they're doing wrong and what doesn't work. And they don't pull back to think, well they are doing some things right and they did get to a certain point today, like you're saying. And they did some things right to get to that point and that needs to be examined. And then, like you said, I think it's really important bringing everyone together. Like the person who knew the Soros family and wasn't in the room before and now they were.

Jamie: So it's really cool examples, and really I think an interesting approach to take, and I don't think a lot of people take that approach. It's really cool. Just shifting a little bit, what do you guys do to measure it? I feel like we're moving towards more of a results-based approach and more measurement and trying to improve upon what we're all doing, what NGOs are out there, trying to do. What kind of approach do you guys take to measure once you've put some of these programs in place?

Mark: That's a great question. We partner again with our clients to be able to identify, "What does success mean to you? If you're successful, what are the measures that you would use to measure that you're successful?" So typically, it is how much money we raise. Obviously, that's a core thing to keep the lights on and keep the people working in the company. So it could be how much money they raise if they're a nonprofit or if they're an income-producing nonprofit, how much money they earn from earned income? If it's a for-profit, it can be sales. It's usually some form of profitability. Or in the social sector, it could be impact, which is harder to measure. But we try to make it as measurable as possible. So if you're a housing organization, how many people got housing that didn't have it before? If it's, let's say, an educational organization, how many people got a diploma, a GED or a college education or certification in whatever field that they were learning?

Mark: And then there's the things that are more intangible, but are still important. So it could be customer satisfaction, it could be client satisfaction, employee satisfaction. And some of those are measurable. They're not as quantifiable as say, let's say, a dollar figure. But we ask them, "What does success look like to you? And when you're most successful, what are the things that are actually working?" And we try to make it limited to three to five key performance indicators, success factor, 'cause if they're thinking about 25 things, they're not gonna be really good at any one of them. So if they can limit it to a few, and we encourage them to have things that are more intangible because sometimes those things are equally, if not more important, things that they can measure. And then we'll try to measure them as much as we can. But sometimes, you can't measure everything but it's important that you actually focus on it and try to measure it and you get some response back from that.

Jamie: Yeah. So where do you see things going? So, a hugely broad question and I feel like we touched upon a couple different areas here. And I think you could answer maybe down one of these paths or if you have a broad 30,000 foot answer here... You touched upon businesses that are trying to marry up profit and purpose, so that's one thing that we're seeing more of. The resource mapping and leveraging networks, examining that, that's something else we touched upon. And then we touched upon a little bit, measurement, you can pick one of those or you could talk about all of them. But where do you see our sector heading next year, three years from now, five years from now, etcetera?

Mark: Well, if I look at the big picture from thinking about the resource ecosystem of the whole world, and then where does a private sector, the public, the social sector fit into this ecosystem, I think the biggest shift is how people are thinking about business. And then if they're a nonprofit, their relationship to business and their own business. 'Cause nonprofits are businesses, they're just businesses with a different tax status. They have to take income in, they have to provide value, they have to give services, products, support, whatever, to their customers, they have constituents and they have to run their organization so whatever comes in is at least equal to what goes out.

Mark: So business, for hundreds of years, has basically said we can operate without being responsible for what business schools call 'the externalities of what we do.' So if we pollute the environment, well, we're not responsible for that. If we have thousands of employees and we have to lay them off, and then when they're laid-off, they have to get unemployment from the government, from taxpayers, not necessarily from us, these are not our responsibilities. If we go into a community and then we take up some land, we own the land but we don't pay for necessarily the roads, the transportation to get there.

Mark: So that's created a lot of problems in the world not being sustainable. So obviously from climate change, to unemployment, to our educational system not being so great. So now I think companies are realizing, they are citizens of a larger world. And so the companies that are becoming much more responsible and are actually trying even some ways to solve the problems that business created are I think the companies that people want to buy from, that people want to work for, they want to live in communities that these companies are operating in. And people realize that a brand is no longer just a cool TV commercial that attracts somebody to buy something that they may or may not need, it's actually something that is part of somebody's life cycle.

Mark: And for the nonprofits, I think they're realizing that for them to be sustainable, they have to provide a value that has some way to be measured, an impact that can be understood and measured if they're going to be able to continue to bring revenue into them. So if we look at just one company that we worked with recently, JPMorgan Chase. So, Jamie Dimon, about three weeks ago, made an announcement that he is giving everybody in his company a raise. Some big raises, people who were not making a lot of money, but actually taking the minimum wage in his company and taking it up. And he made a big announcement, and basically said, "We realized that it's important for our people to have a living wage. Even if we could pay them less, we don't want to pay them less because it's not fair, it's not right, and in the end, it's not sustainable for us because we have more turnover, we have less committed employees. So we gotta put a stake in the ground saying, 'We should at least establish what we think is a living wage for our people.'" Those are great. Is it earth-

shattering? No, but it was a step. And the fact that he publicized it, I think was very inspiring to people, particularly in the financial services sector.

Mark: So we did a project with JPMorgan Chase, which is really illustrative of having companies really align what their brand is about, who they serve with their foundations and who they give money to. So JPMorgan Chase has about 250,000 employees around the world in hundreds of countries. Many of these employees like many employees at many companies, want to give back. They want to volunteer. They wanna have some part of what they do to give to organizations that really need their help. Like a literacy assistance center, like a local community-based organization.

Mark: Well, how do they do that? Many of their employees are very busy, they have families, they have kids, they may have a second job. So typically, you go to paint a church on a weekend. You work in a soup kitchen, and they're at Thanksgiving. And if you're really ambitious, maybe you sit in a board of directors, it takes up a lot of time. Or you work on a project that could take months. What if we could find something that would allow an employee with talent and passion to be able to give a half a day, just one time to make a difference? So what we did with the JPMorgan Chase Foundation is they identified three nonprofits in the financial services sector that were all about financial inclusion and empowerment: Mission Asset Fund, MyPath and Earn, all based in San Francisco, and we matched those three with employees who ran the chase.com website, also out of San Francisco.

Mark: So we worked with these nonprofits over a period of just a couple of months, and said, "What is your biggest business challenge that needs technology and strategic skills?" So we identified each one had the challenge, developed a PowerPoint presentation. We then did a half-a-day strategic brainstorming and action-planning session with about 17 volunteers from JPMorgan Chase. So Friday at 4:00, working lunch... I'm sorry, Friday at 12 noon, working lunch, ends at 4:00. They came out of this with strategic insights from people that saw their organization in a very different way, had both the skills and the experience, and an action plan, a first drafted one, that helped them go and take their challenge and solve it, moving forward. They now had a viewpoint from the private sector that they had never had before. They got to share this with their other nonprofits when we did this sort of debriefing session at the end. And a few of the volunteers decided, "I wanna volunteer longer term. I wanna be a resource. I wanna be on their map."

Mark: So it was incredibly innovative and in one-half a day, we got a results for the nonprofits. And then Chase had these employees feeling, like, "Wow, I can contribute on Chase's time. I could use my skills and my passion. And I now know what Chase is doing with their money." They're funding organizations that are aligned with their brand which is really helping people get more access and use out of their money.

Jamie: Right, that's great. So yeah, we're reading more about that as well, skills-based volunteering, basically. So it's also something that Opportunity Lab helps organizations with?

Mark: Yeah. Well, we help them match talent in the organization with organizations that they fund or they wanna support around this process, which is really a Culture of Opportunity process, which uses Success DNA, uses resource mapping. It uses what we call an opportunity team, which is a group of people from the outside helping them get a view that they didn't have, and then creating an opportunity plan. So the Culture of Opportunity process, which we've touched upon in these examples.

Mark: So I'll give you a quick overview of what it is. It starts with this idea of an opportunity team, that every organization that's gonna be sustainable and continue to grow and adapt under the massive changes and disruption that we're seeing in the world has to have an outside viewpoint that challenges its existing reality, that challenges the status quo, just like we did with the resource map for the Literacy Assistance Center. And these are people who have passion for the organization, who have a skillset that's complementary to what they need on their existing internal team and that have the willingness to be honest and kind in telling them what they see.

Mark: So we have the opportunity team, then we define the business results that they're committed to right now. Not a five-year vision but like, what do you need to do to pay the rent? What do you need to do to pay your employee's payroll? If you have a contract with a foundation, what is it you have to deliver this year? We get a stake in the ground, as specifically, as measurably can, are the business results that you, nonprofit or for profit, are committed to right now. So you actually own that and see how you're gonna measure that. Then, we do the Success DNA. So we see what works in your organization, inside, outside profile, do the resource map, and then, we say, "Year of opportunity. If you had the most extraordinary year and you could do the things that you've always wanted to do based on what you're great at, what you're passionate at, what would that be?" So we brainstorm that with the opportunity team from inside and outside, put it on a big whiteboard, and they come up with 25 blue-sky opportunities.

Mark: We can't do 25, which ones do you pick? Well, we have a filtering process. So we say, "Will it impact your business results in the timeframe you need it to? Is it consistent with your Success DNA? Do you have the resources on your map to do it? Is your team bought in?" That four-question filter takes those 25 down to, let's say, three or four. Then, we put those on an action plan, which we call the opportunity plan. And now, they're strategically focused around three projects that will move the needle for them, that are consistent with their Success DNA, their resources, and their team is bought into. And then, we help them execute those three.

Mark: Six months later, another opportunity comes. What do we do? We've got three we're working on now. Well, let's put it through the filter. Will it impact your business results in the time you need it to? Is it consistent with the Success DNA? Do you have the resources to do it? Is your team bought in? And we do that because you can't just stay with those three projects because if something comes along, it might change your whole organization. You can't say automatically, "No," or, "Yes." So it's creating what we call a Culture of Opportunity, which is an inside-out organic way to be able to succeed, rather than a 10-year plan, and then fixated on reaching that plan, oblivious to the realities of life today.

Jamie: Alright, Mark, this has been fascinating. Thanks for your time and for sharing all those great insights with us. To learn more about Opportunity Lab, you can visit opplab.com, follow them on Twitter @OppLab and follow Mark @MarkMonchek. Make sure to subscribe to The Champions for Social Good Podcast so you don't miss an episode. You can keep up with the conversation between episodes by following us on Twitter @jamieserino, @MicroEdgeLLC and @blackbaud. Thank you for listening.